

Ching, Godfrey*Let Godfrey know by Friday, 6/8/01*

From: Matsuura-Oneha, Veronica
Sent: Monday, June 04, 2001 3:52 PM
To: Golonka, Randall; Chen, Leslie; Yamane, Calvin (DLA Hawaii); Ano, Catherine; Ching, Godfrey; Miyamoto, Lilinoe; Saki, Shirley; Ting, Danilo; Adams, Kathleen; Tamura, Nanette; Putorak, Leo
Cc: Domdoma, Edwin
Subject: Pre-Retirement Planning Workshop

DRMSI-Pacific
 DRMSI-G
 DSS-DP

DRMO Hawaii is scheduling a Pre-Retirement Planning and Informational workshop for interested employees. We have acquired the service of Joseph Rothstein, Ph.D., CFS, from American Express Financial Advisors Inc. Mr. Rothstein will be covering the following topics:

- Thrift Savings Plan - how it works and why it's important
- Health insurance and Medicare
- FEGLI and Life Insurance alternatives before and in retirement
- Meeting the potential costs of Long Term Care
- Investing and tax-advantaged investment opportunities during retirement
- Spousal survivor and death benefits
- Additional survivor benefit options

Topics of particular importance for CSRS employees include:

- CSRS retirement eligibility and "Early Out" penalty
- Paying for temporary, refunded, and military time
- Sick leave and annuity computation
- Voluntary contributions and COLAs

Topics of particular importance for FERS employees include:

- FERS retirement eligibility
- Paying for temporary and military time
- Annuity computation and the FERS supplement
- Disability retirement and COLAs
- TSP Agency Automatic and Matching Contributions
- Social Security benefits

Munday
 Mr. Rothstein has agreed to do a one day informational workshop on July 30, 2001, at the DRMO at a cost of \$35 per participant. The IMPAC card may be used as vehicle of payment. If you are interested in attending, please provide me your list of names NLT 13 JUN 01.

For DRMO Hawaii Supervisors:

Please provide the names of those interested in attending - if employee attended previous retirement training please state class and date.